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Foreign Crops and MARKETS



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WORLD CITRUS PRODUCTION (Page 62)

Mediterranean Basin Olive Oil
Production (Page 68)

L A T E N E W S (Page 61)

CONTENTS

Page

COTTON

Cotton-Price Quotations on Foreign Markets..... 79
Cotton Mill Operations in Spain Improve 83

ECONOMIC DEVELOPMENTS

Romania's Four-Year Plan for Agriculture..... 84

FATS AND OILS

Czechoslovakian Oilseed Output Shows Decrease... 80
Burma Peanut Acreage Increased Slightly..... 81

FRUITS, VEGETABLES AND NUTS

World Citrus Production Forecast at 368 Million
Boxes in 1947-48..... 62
Mediterranean Basin Olive Oil Output Largest
Since 1937-38..... 68
Greek 1947 Currant Production Estimate Lower.... 72
Iran Pistachio Crop Smaller..... 72
Greek 1947 Raisin Production Estimate Reduced... 72
Spanish Government Fixes Nut Prices..... 73
Spanish Dried Fig Production Up..... 74
British Contract For 3.3 Million Boxes Spanish
Oranges..... 83

GRAINS, GRAIN PRODUCTS AND FEEDS

Increased Seedings of European Winter Grain
Indicated..... 77
Australia's Coarse Grain Prospects Good..... 78

LIVESTOCK AND ANIMAL PRODUCTS

French Dairy Situation..... 81

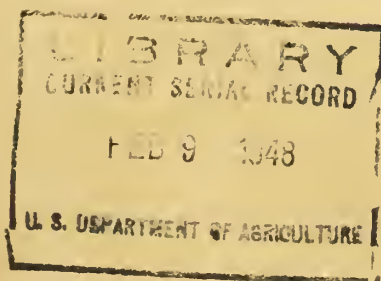
TOBACCO

South Africa Flue-Cured Production Rises..... 74
U.S. Share in French Tobacco Imports Declines... 74
Denmark Still Rations Tobacco..... 75
Indo-China Depends On Tobacco Imports..... 76

FOR RELEASE

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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

L A T E N E W S

Effective January 10, 1948, the Italian tobacco monopoly ended rationing of cigars and little cigars. Rationing of pipe tobacco and cigarettes continues.

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Production of winter vegetables in Cuba, during the 1947-48 season may be a fourth larger than that of last season, unless serious blight attacks the tomato crop. Total shipment of all vegetables during 1946-47 amounted to 47.8 million pounds. Growing conditions for early crops have not been very satisfactory. Rains destroyed or damaged the seedlings so that shipments for the first two months of the season have been only about half as large as during the same period last season. Mid-season production and shipments are at their height and plantings of late vegetables are now being made.

Tomato acreage is estimated at 18,200 acres, 10 percent above last year's. Production under normal conditions would have been 60 million pounds but a severe outbreak of blight has reportedly damaged the crop by 50 percent. Shipments during the months of November and December totalled 1.9 million pounds as compared with 4.2 for the corresponding period last season and the prospects are now for total season's exports of not to exceed the 24 million pounds exported last season.

About 2000 acres will be planted to lima beans, which would result in a crop of around 10 million pounds in the pod. Nearly the entire crop will be frozen for shipment to the United States. Eggplant acreage will be about 20 percent less than that of last year and shipments may be around 800,000 pounds, about half of last year's 1,632,000 pounds. Cucumber production, from 700 acres, may reach 32,000 crates (3.7 million pounds).

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The first estimate of summer fruit in Argentina for the 1947-48 season, places the apple crop at 4,381,000 bushels, about 33 percent below the crop of 6,575,000 bushels for the preceding season. The pear crop is estimated at 3,129,000 bushels as compared with 4,158,000 bushels for 1946-47. Smaller crops of apples and pears are a result of serious frost damage during October in the Rio Negro Valley. Table grapes show the largest increases over last year's crop and are estimated at 256,000 tons, about 12 percent above last year's crop of 209,000. The peach crop is estimated at 6,627,000 bushels, 2.5 percent higher than 6,467,000 bushels last year. Apricots placed at 3,950 tons are about 200 tons more than the preceding year. Cherries, estimated at 1,924 tons are nearly 6 percent below last year's crop of 2,039 tons.

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WORLD CITRUS PRODUCTION FORECAST AT 368 MILLION BOXES IN 1947-48

Citrus fruit production in the major producing countries of the world during the 1947-48 season is forecast at 368 million boxes, an increase of 5 percent over the 1946-47 crop of 352 million (revised estimate) and 38 percent above the 1935-39 average production of 266 million boxes. Of the total of 368 million boxes of citrus fruit expected during the 1947-48 season, oranges and tangerines account for 275 million, grapefruit 66 million and lemons 27 million boxes.

The 16 million-box increase in the 1947-48 citrus crop as compared with 1946-47 production results from increases of 12 million boxes in the production of oranges, three million in the output of grapefruit and one million boxes in the lemon crop. Larger crops of oranges and tangerines in certain foreign countries, particularly Spain and Palestine, more than offset the reduction expected in the orange and tangerine crop in the United States during the 1947-48 season.

Oranges.- The 275 million-box forecast of the 1947-48 orange and tangerine crop in the major countries is 5 percent larger than the 263 million boxes produced in the preceding season. North American groves are expected to produce about 46 percent of the above total, largely in the United States; Europe 18 percent, mostly in Spain and Italy; South America 16 percent, commercial production chiefly in Brazil and Argentina; Asia 12 percent (leading countries Palestine and Japan); Africa 7 percent and Australia and New Zealand the remaining 1 percent.

In North America, the United States crop is forecast at 108.3 million boxes of oranges and 4.3 million boxes of tangerines as compared with 114.0 million boxes of oranges and 4.7 million boxes of tangerines produced in 1946-47. The Mexican crop, expected to total about 11.1 million boxes, would be slightly larger than that of last season. Although one-half million trees are expected to begin bearing in Mexico this season, the potential increase in the crop was mostly offset by the effects of drought upon the unirrigated groves. The Cuban crop is reported to be down about one-fourth from last year's as the result of drought during the blossoming season and excessive rains last fall. Other West Indian areas generally show improved prospects as compared with the 1946-47 season.

Production in the European countries in 1947-48 is forecast at 49.9 million boxes, an increase of 20 percent over the preceding crop of 41.6 million boxes. The expected increase in the European crop results from the recovery of the Spanish groves since the January 1946 freeze. High nitrogen fertilizers and insecticides are now generally available to the Spanish growers and the groves are receiving better care. Fruit prices have been high and grower incomes good during the past two seasons. Size and quality of the 1947-48 crop are reported to be exceptionally good.

The Spanish orange crop consists chiefly of sweet oranges but includes, as a rule, about 150,000 boxes of tangerines and 500,000 to 600,000 boxes (70 pound equivalents) of Seville, or bitter oranges.

The orange and tangerine crop in Greece is about one-third above the 1946-47 production, largely as the result of better care of the groves, including the use of larger quantities of fertilizer and insecticides. Of the expected production of about 1.5 million boxes, about 200,000 boxes are tangerines and 30,000 to 35,000 boxes are bitter oranges. It is the policy of the present Greek Government to encourage new plantings by establishing nurseries and developing export markets. Compared with 1939, there has been an increase of 16 percent in the cultivated area of oranges and 26 percent in tangerines. The orange crop in Italy is forecast at 11.6 million boxes, the same as the 1946-47 crop.

Recovery of the citrus industry in Palestine from the effects of the war is the outstanding development in the Asiatic area. With loss of markets during the war, the groves were given a minimum of care and production dropped to about 7 million boxes of all citrus fruits. Since the war, production has risen rapidly and is expected to total 15 million boxes in 1947-48, 13 million of which are oranges, mostly Shamouti or Jaffa oranges.

The orange and tangerine crop in Lebanon is forecast at 2.3 million boxes, nearly double the 1946-47 production of 1.2 million. Of the 1947-48 crop in Lebanon, about 250,000 boxes are tangerines and 125,000 boxes bitter oranges. The current season's crops in Cyprus, Iran, and Turkey are believed to approximate the 1946-47 production, while the crop in Japan is expected to exceed, slightly, that of the preceding season. The Satsuma is the leading type of orange in Japan.

Leading areas in Africa are expected to produce about 18.9 million boxes this season as compared with 17.7 million in 1946-47. The increases are expected to occur largely in Algeria, French Morocco and the Union of South Africa. Weather conditions, generally, have been more favorable in the African areas this season than last, and better care has been given the groves.

In South Africa, total citrus acreage is estimated at 50,000 acres and 5 million trees, about the same as reported 10 years ago. During this decade there has been some shift in the producing areas due to drought and frost in the far western Transvaal and frost in northwestern Cape Province. The shift has resulted in the development of new areas and expansion of older areas in eastern portions of the Transvaal and Cape Province where weather conditions and water supplies are better. About 60 percent of the South African orange production is of the Valencia type, and 35 percent Navels.

In French Morocco, about 80 percent of the 2.2 million box crop is expected to be produced in the so-called "European" plantings, the remaining 20 percent in scattered native plantings. Of the production forecast for the European plantings, about 1,000,000 boxes are Navels, 285,000 mid-season varieties, 190,000 late varieties, 225,000 Clementines and 60,000 boxes are tangerines. Algeria expects a crop of about 3.4 million boxes as compared with 3.1 million in 1946-47. Of the 3.4 million box estimate, about 850,000 are tangerines and 190,000 are clementines.

The 1947-48 orange crop in the major South American areas is expected to total 45.2 million boxes as compared with 43.9 million in 1946-47. The Brazilian crop is estimated at 27 million as compared with 25.6 million last season.

when production was reduced by unfavorable weather in Rio de Janeiro and the Federal District. The combined crop in the two exporting States of Sao Paulo and Rio de Janeiro will probably total about 11 million boxes, about one-half of prewar production. This reduction results from the loss of an estimated 50 percent of the orange trees from tristeza infection. Production has been increasing in other areas of Brazil where the fruit is grown for domestic consumption and the trees are mostly on sweet orange root stock. The 1947-48 crops in Argentina and Uruguay are expected to approximate those of last season. Paraguay is credited with a relatively large production of oranges but most of this is non-commercial. Current production is down in Ecuador, but is about the same as last season in Chile, Surinam and Colombia. Oranges are grown also in Peru where about 60 percent of the fruit is of the "criollo" type, or a small unimproved orange from the original Spanish introduction. The crop in Peru may total in the neighborhood of 840,000 box equivalents.

Grapefruit.- While oranges are grown in substantial quantities in many countries of the world, grapefruit production is quite limited. Grapefruit was first grown commercially in Florida, and the United States still produces about 95 percent of the world total. Of the 1947-48 forecast of 66.1 million boxes, the United States is expected to produce 62.3 million, the West Indian area 1.2 million, Palestine 1.5 million and South Africa 800,000 boxes.

Total production of grapefruit in the West Indies is now about the same as prewar. A drop in the Cuban production has been offset by an increase in Trinidad and Tobago.

Outside the United States, Palestine is the leader in commercial grapefruit production. During the war production in Palestine dropped to about 700,000 boxes, slightly less than half of the prewar average. The 1947-48 crop is expected to equal the prewar production and further increase can be expected. Also, in the Mediterranean area, Algeria and French Morocco each are now producing nearly 100,000 boxes. Spain produces a few grapefruit, probably 10,000 to 15,000 boxes, but grapefruit is not popular on Spanish markets and growers are reported to be topworking their trees to oranges, chiefly Navels.

Production of grapefruit in South Africa is forecast at 800,000 boxes this season, nearly double the prewar average. In South America, Argentina is the only country with significant commercial production, forecast at 100,000 boxes in 1947-48. An insignificant amount of grapefruit is grown in Brazil. Australia is developing a commercial acreage; production there may reach 100,000 to 125,000 boxes this season and can be expected to increase during the next few seasons.

Lemons.- Of the 1947-48 forecast of 26.7 million boxes in the major producing countries, 14.1 million are expected in the United States, 7.3 million in Italy, 1.1 million in Argentina, 1.0 million in Spain, 600,000 in Lebanon, 500,000 in Palestine. Greece, Australia and Chile each expect about 400,000 boxes, Tunisia 175,000, and Algeria, Egypt, and the Union of South Africa each about 150,000 boxes. New Zealand, Cyprus, Iran, French Morocco, Syria and the Aegean Islands account for the remaining production.

(Text continued on page 68; tables follow)

CITRUS FRUIT: Production in specified countries,
average 1935-39, annual 1943-47
ORANGES, including tangerines

Continent and country	Average 1935-39	1943	1944	1945	1946	1947 a/
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
North America:						
Costa Rica.....	6:	33:	30:	30:	30:	30
Mexico.....	4,761:	8,317:	8,943:	9,280:	10,777:	11,099
United States.....	67,034:	106,651:	113,210:	104,350:	118,680:	112,560
Cuba.....	1,050:	1,250:	625:	1,000:	1,200:	925
Dominican Republic...	500:	492:	321:	485:	428:	500
Jamaica.....	595:	500:	525:	600:	315:	500
Trinidad and Tobago...	55:	70:	75:	75:	77:	80
Total.....	74,001:	117,313:	123,729:	115,820:	131,507:	125,694
Europe:						
Aegean Islands.....	43:	40:	40:	40:	40:	40
France.....	37:	20:	28:	28:	30:	30
Greece.....	1,246:	1,000:	1,000:	1,216:	1,124:	1,468
Italy.....	11,701:	11,621:	8,489:	9,715:	11,609:	11,590
Spain.....	24,167:	27,166:	33,380:	26,600:	28,800:	36,800
Total.....	37,194:	39,847:	42,937:	37,599:	41,603:	49,928
Asia:						
Cyprus.....	441:	325:	369:	317:	600:	600
Iran.....	483:	1,575:	1,300:	1,500:	1,400:	1,400
Lebanon.....	b/ 1,093:	b/ 1,095:	827:	1,553:	1,211:	2,280
Palestine.....	8,652:	8,400:	6,000:	8,000:	9,199:	13,000
Syria.....	c/ :	c/ :	70:	70:	73:	81
Turkey.....	1,343:	774:	908:	1,110:	1,265:	1,300
Japan.....	15,895:	17,500:	15,669:	11,912:	12,000:	13,000
Philippine Islands...	136:	100:	90:	90:	90:	90
Total.....	28,043:	29,769:	25,233:	24,552:	25,838:	31,751
South America:						
Argentina.....	9,212:	11,240:	11,136:	9,092:	9,990:	10,000
Brazil.....	34,466:	27,804:	28,621:	29,967:	25,625:	27,000
Chile.....	250:	415:	440:	500:	500:	500
Ecuador.....	580:	500:	475:	493:	444:	336
Paraguay.....	5,000:	7,394:	7,000:	6,700:	6,450:	6,500
Surinam.....	20:	25:	36:	43:	86:	100
Uruguay.....	1,300:	1,100:	900:	794:	782:	800
Total.....	50,828:	48,478:	48,608:	47,589:	43,877:	45,236

Continued--

CITRUS FRUIT: Production in specified countries,
average 1935-39, annual 1943-47
ORANGES, including tangerines

Continent and country	Average 1935-39	1943	1944	1945	1946	1947 a/
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
Africa:						
Algeria.....	3,199:	3,449:	3,221:	4,298:	3,055:	3,401
British East Africa:	100:	140:	150:	144:	150:	150
Egypt.....	6,455:	7,252:	6,915:	6,742:	6,900:	7,000
French Morocco.....	1,203:	1,464:	1,766:	2,149:	1,858:	2,211
Northern Rhodesia..:	11:	12:	13:	13:	13:	13
Southern Rhodesia..:	193:	202:	227:	200:	200:	225
Tunisia.....	323:	409:	488:	362:	300:	400
Union of South Africa.....	4,000:	6,860:	4,827:	4,505:	5,270:	5,500
Total.....	15,484:	19,788:	17,607:	18,413:	17,746:	18,900
Oceania:						
Australia.....	2,683:	2,666:	2,875:	2,606:	2,913:	3,120
New Zealand.....	23:	9:	14:	5:	10:	10
Total.....	2,706:	2,675:	2,889:	2,611:	2,923:	3,130
World Total.....	208,256:	257,870:	261,003:	246,584:	263,494:	274,639

GRAPEFRUIT

North America:						
United States.....	31,787:	56,090:	52,180:	63,450:	59,520:	62,270
Cuba.....	375:	350:	325:	212:	195:	165
Jamaica.....	213:	250:	275:	266:	266:	250
Puerto Rico.....	448:	500:	500:	500:	500:	525
Trinidad and Tobago:	70:	130:	200:	241:	291:	300
Total.....	32,893:	57,320:	53,480:	64,669:	60,772:	63,510
Asia:						
Palestine.....	1,445:	800:	692:	800:	1,238:	1,500
South America:						
Argentina.....	49:	182:	112:	99:	101:	100
Africa:						
Algeria.....	- :	11:	15:	16:	55:	91
French Morocco.....	25:	24:	37:	42:	70:	95
Union of South Africa.....	431:	968:	681:	636:	744:	800
Total.....	456:	1,003:	733:	694:	869:	986
World Total.....	34,843:	59,305:	55,017:	66,262:	62,980:	66,096

continued --

CITRUS FRUIT: Production in specified countries,
average 1935-39, annual 1943-47

LEMONS

Continent and country	Average 1935-39	1943	1944	1945	1946	1947 a/
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
North America:						
United States.....	9,552	11,050	12,550	14,450	13,760	14,100
Europe:						
Aegean Islands.....	9	10	10	10	10	10
Greece.....	367	375	375	328	406	415
Italy.....	9,637	8,092	6,784	6,373	7,138	7,250
Spain.....	1,444	1,573	1,431	812	737	950
Total.....	11,457	10,050	8,600	7,523	8,291	8,625
Asia:						
Cyprus.....	53	56	43	89	83	85
Lebanon..... b/	464	350	336	725	435	638
Palestine.....	88	60	312	350	353	500
Syria..... c/			8	9	9	10
Total.....	605	466	699	1,173	880	1,233
South America:						
Argentina.....	371	1,075	998	1,021	1,108	1,150
Chile.....	250	290	290	350	450	400
Total.....	621	1,365	1,288	1,371	1,558	1,550
Africa:						
Algeria.....	102	95	82	119	102	145
Egypt.....	83	100	140	150	150	150
French Morocco.....	10	8	6	14	24	31
Tunisia.....	45	145	174	174	180	175
Union of South Africa..	142	242	170	106	124	150
Total.....	382	590	572	563	580	651
Oceania:						
Australia.....	308	364	335	336	456	428
New Zealand.....	65	56	62	54	60	65
Total.....	373	420	397	390	516	493
World Total.....	22,990	23,941	24,106	25,470	25,585	26,652

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign-service officers, results of office research and other information. Production estimates relate to the crop from bloom of year shown. Harvesting in Northern Hemisphere countries begins about November and in Southern Hemisphere about February of the following year. Production in foreign countries converted to boxes of the following weights. Oranges, 70 pounds; grapefruit, 80 pounds; lemons, 76 pounds. a/ Preliminary. b/ Includes Syria. c/ Included in Lebanon.

Italian production for export is in Sicily. There is a considerable production on the Mainland, particularly in the Province of Calabria, which is sold on the Italian markets. In Sicily, there has been a substantial loss of trees from a disease known locally as "mal seco" which is reported to be similar to tristeza in its effect. While there has been some recovery of the industry since the war it is not expected that production will soon return to prewar levels. Spanish production is still well below prewar levels, in part the result of the severe freeze of January 1946. In Greece, production has been increasing in recent years although tree numbers are reported to have decreased about 13 percent since 1939.

The total crop of lemons, 1.2 million boxes forecast for 1947-48, in the four Asiatic countries of Lebanon, Palestine, Cyprus and Syria is double the prewar average. The 500,000 boxes expected in the four North African countries of Algeria, Egypt, Tunisia and French Morocco also double the prewar level, while South African lemon production approximates that of prewar. In South America, production has increased substantially since the prewar period (1935-39) but has remained at about the present level of 1.0 million to 1.1 million boxes in the most important country, Argentina, for the past 5 years. Brazil is reported to have lost practically all of the lemon trees from tristeza infection. Most of the so-called "lemons" reported in Brazil are limes. These two fruits have been confused in Brazilian trade statistics for many years.

Lemon production in Australia, forecast at 428,000 boxes in 1947-48, is slightly under the 1946-47 crop but 39 percent above prewar. Further increase can be expected. Production in New Zealand this season is forecast at 65,000 boxes, slightly larger than in 1946-47 and equal to the prewar average.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, G. Burmeister, M. McCown, and R. Tucker.

MEDITERRANEAN BASIN OLIVE OIL OUTPUT LARGEST SINCE 1937-38 1/

The 1947-48 preliminary estimate of edible olive oil in the principal producing countries of the Mediterranean Basin is 1,073,700 short tons, compared with 813,200 tons in 1946-47 (revised) and 539,200 tons in 1945-46 (revised). This is 19 percent above the 10-year (1935-36/1944-45) average of 901,300 tons and 27 percent above the 5-year (1940-41/1944-45) average of 845,000 tons.

The output is the largest since 1937-38 and the second largest in the past quarter of a century. This year's production shows considerable increases for Italy, Portugal, Greece, Syria-Lebanon, and Turkey. Modest increases were reported for France, Spain, Palestine, and Algeria. Tunisia and French Morocco output is reported the same as the previous year.

Growing conditions in all countries excepting those in North Africa were considerably better than a year earlier. Fly damage was less than normal, taking the group as a whole, though some countries reported more than a normal

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

EDIBLE OLIVE OIL: Estimated production in the Mediterranean Basin (revised)
(Rounded to nearest 100 short tons)

Year	France	Greece	Italy	Portugal	Spain	Palestine	Syria and Lebanon
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Averages							
1935-36/1944-45	8,100	99,100	223,400	62,700	375,500	7,500	13,100
1940-41/1944-45	6,700	91,900	210,400	62,600	342,800	7,600	12,800
Annual							
1936-37	10,000	70,600	167,100	a/ 30,000	435,000	3,500	10,300
1937-38	7,700	158,000	295,000	107,000	550,000	8,800	19,600
1938-39	10,000	90,000	187,000	a/ 36,800	352,000	9,700	13,200
1939-40	11,000	115,500	300,000	a/ 83,400	220,000	4,900	10,400
1940-41	9,000	115,300	168,800	a/ 38,000	350,000	11,600	11,800
1941-42	7,000	96,700	223,200	a/ 99,300	418,000	2,200	8,600
1942-43	4,200	91,500	198,600	a/ 41,400	264,000	10,400	19,800
1943-44	4,400	88,900	197,000	a/ 95,100	440,000	10,900	11,800
1944-45	9,000	67,100	264,400	a/ 39,300	242,000	3,000	11,900
1945-46	5,500	107,000	110,000	a/ 43,800	176,000	a/ 11,700	23,000
1946-47 b/	a/ 4,400	a/ 91,300	165,000	a/ 49,500	a/ 385,000	a/ 1,600	10,100
1947-48 b/	6,300	140,000	275,000	89,000	400,000	3,300	23,100
			French		Other		
	Turkey	Algeria	Morocco	Tunisia	Countries	Total	
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	
Averages							
1935-36/1944-45	31,600	16,300	11,100	46,800	6,100	901,300	
1940-41/1944-45	31,500	17,200	12,200	44,100	5,200	845,000	
Annual							
1936-37	16,500	10,000	11,000	16,500	2,400	a/ 782,900	
1937-38	42,000	17,500	11,400	60,500	11,600	1,289,100	
1938-39	30,000	10,000	6,700	27,500	8,700	a/ 781,600	
1939-40	45,000	25,000	13,200	77,000	6,700	a/ 912,100	
1940-41	29,700	10,300	19,800	17,600	5,300	a/ 787,200	
1941-42	38,500	20,600	10,600	26,700	7,800	a/ 959,200	
1942-43	35,200	17,600	13,200	55,000	4,300	a/ 755,200	
1943-44	27,500	20,900	9,900	38,500	4,900	a/ 949,800	
1944-45	26,400	16,500	7,600	82,500	3,700	a/ 773,400	
1945-46	35,200	8,800	5,500	a/ 7,700	5,000	a/ 539,200	
1946-47 b/	a/ 35,200	22,000	a/ 19,800	22,000	a/ 7,300	a/ 313,200	
1947-48 b/	66,000	24,200	19,800	22,000	5,000	1,073,700	

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, or other information.

a/ Revised.

b/ Preliminary.

UNITED STATES: Imports of edible olive oil by specified countries
1937 to date

Year <u>a/</u>	(In packages of less than 40 pounds)					
	France	Italy	Spain	Other countries	Total	
	Short tons	Short tons	Short tons	Short tons	Short tons	
Average						
1942-46	-	263	133	19		415
1937-46	84	4,068	257	121		4,530
Annual						
1937	256	8,520	581	66		9,423
1938	260	14,223	584	281		15,348
1939	222	11,535	441	360		12,558
1940	98	4,947	292	316		5,653
1941	-	143	9	91		243
1942	-	74	-	35		109
1943	-	6	b/	38		44
1944	-	-	b/	-		b/
1945	-	-	595	b/		595
1946	-	1,236	72	23		1,331
1947 <u>c/</u>	6	1,145	37	236		1,424
	(In packages: of over 40 pounds)					
	France	Italy	Spain	Algeria & Tunisia	Other countries	Total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Average						
1942-46	8	131	1,689	28	956	2,812
1937-46	915	1,758	2,200	918	3,414	9,205
Annual						
1937	2,803	4,835	4,727	1,322	1,055	14,742
1938	4,070	6,027	2,014	4,695	3,383	20,189
1939	1,628	4,583	3,876	1,433	7,350	18,870
1940	575	1,420	2,630	1,201	13,557	19,383
1941	35	58	312	393	4,020	4,818
1942	22	39	493	140	2,690	3,384
1943	20	11	266	-	1,303	1,600
1944	-	-	31	-	119	150
1945	-	-	3,924	-	6	3,930
1946	-	606	3,731	-	662	4,999
1947 <u>c/</u>	-	565	1,636	-	1,048	3,249

Compiled from official records of the Bureau of the Census.

a/ Calendar year.

b/ Less than one-half ton.

c/ Ten months, January through October 1947.

UNITED STATES: Total imports of edible olive oil by specified countries,
1937 to date

(Including oil imported in less than 40 pound packages
and over 40 pound packages)

Year ^{a/}	France	Italy	Spain	Algeria & Tunisia	Other countries	Total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Average						
1942-46	8	394	1,822	28	975	3,227
1937-46	999	5,826	2,457	918	3,535	13,735
Annual						
1937	3,059	13,355	5,308	1,322	1,121	24,165
1938	4,330	20,250	2,598	4,695	3,664	35,537
1939	1,850	16,118	4,317	1,433	7,710	31,428
1940	673	6,367	2,922	1,201	13,873	25,036
1941	35	201	321	393	4,111	5,061
1942	22	113	493	140	2,725	3,493
1943	20	17	266	0	1,341	1,644
1944	0	0	31	0	119	150
1945	0	0	4,519	0	6	4,525
1946	0	1,842	3,803	0	685	6,330
1947 ^{b/}	6	1,710	1,673	0	1,284	4,673

Compiled from official records of the Bureau of the Census.

^{a/} Calendar year.

^{b/} Ten months, January through October 1947.

OLIVE OIL SUMMARY--(Continued from page 68)

amount of damage. More rains would have been beneficial in nearly all countries and especially in North Africa.

The export situation is the best in many years with exportable surpluses being available in good volume in the principal producing areas. Estimates of the total tonnage available for export vary from 100,000 to 160,000 short tons. However, it is very unlikely that much over half this quantity will actually be exported. There was relatively little carry-over of high grade oil from the previous year. The heavy supply of available oil has caused a considerable decline in prices throughout most of the area. Export selling pressure is strong in view of the desire of most countries to obtain United States dollars. Some countries still require the importation of a like quantity of other oil before olive oil may be exported. The free market price in Italy is actually below that of the ration. Rationing is still officially in force in most countries though it is likely to be removed before long in some because of the increased supply.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, W. R. Schreiber, C. M. Purves, and Lois Bacon.

COMMODITY DEVELOPMENTS

FRUITS, VEGETABLES AND NUTSGREEK 1947 CURRANT PRODUCTION
ESTIMATE LOWER

The 1947 preliminary estimate of currant production in Greece has been revised downward by the Greek Autonomous Currant Organization to 84,500 short tons. Grower's optimism as to the size of the crop pushed the estimate to 91,300 tons in November, but as the fruit came in it developed that the crop had been considerably overestimated.

Currants, like raisins, were slow moving into the export trade during the first few months of this season. The Greek currant office in late November was successful in consummating a sale to the United Kingdom of 33,000 short tons of "good quality" currants at a price of \$227.50 per ton of 2,200 pounds, f.o.b. Greek ports. A sale was also made to Ireland of 1,540 tons at \$247.00 per ton of 2,200 pounds and 77 tons at \$260.00 to Belgium and Switzerland. The entire lot sold to Ireland had been shipped by early December, but a substantial tonnage of the United Kingdom sale remained to be shipped.

IRAN PISTACHIO
CROP SMALLER

The 1947 preliminary estimate of commercial pistachio production in Iran is 1,000 short tons, unshelled basis, compared with 1,400 tons in 1946. Production data for other years are not available. The trade estimates that commercial production is only about a third of the total crop. The leading producing centers are Rafsanjan, Ardekan and Kerman.

Exports during the 1946 marketing season were reported to have totaled 270 short tons of shelled and unshelled nuts combined. India was the destination for 208 short tons; 37 tons went to Iraq and 16 tons to Lebanon. Export data on the present season are not yet available. However, about 60 short tons went to the United States, and additional shipments to this country are expected. Last quotations for best quality were around \$1,250 per 2,200 pounds unshelled, f.o.b. Khorramshar, Iran.

GREEK 1947 RAISIN PRODUCTION
ESTIMATE REDUCED

The 1947 preliminary estimate of raisin production in Greece is now placed at 27,500 short tons, of which 1,100 tons were Rozaki and the balance Sultanas. This estimate may be compared with 20,900 tons in 1946 and 9,400 tons in 1945. While it is much too early to forecast the 1948 crop with any degree of accuracy, many persons connected with the industry in Greece believe the crop will be as large or larger than the one just harvested.

The export movement of raisins made a very slow start this season, but in November a sale of 11,000 short tons, good quality Sultanas, at \$276.25 per ton of 2,200 pounds was reported made to the United Kingdom. The raisins were to be packed in 28-pound wooden boxes and the price was f.o.b. Greek port. About the time this sale was consummated a strike of dock workers delayed the shipment but delivery has now been made. Some exporters believe that most of the 1947 pack will be disposed of either in export or domestic channels before 1948 pack raisins become available.

SPANISH GOVERNMENT FIXES NUT PRICES

The Spanish Ministries of Agriculture and Commerce issued an Order January 5, 1948 permitting the movement of stocks of almonds and hazelnuts frozen by the Order of November 14, 1947.

The new Order requires that a minimum of 75 percent of the stocks frozen in November must be set aside for export. The balance may be sold in the domestic market. This Order applies to wholesalers and shellers as well as exporters. A minimum of two thirds by weight of the almonds and 50 percent of the hazelnuts still in hands of growers must also be sold for eventual export abroad.

The Order fixes a maximum price of 9.00 to 10.30 pesetas per kilogram for shelled almonds and 9.50 pesetas for shelled hazelnuts laid down at exporters warehouse. (About 37.36 to 42.75 United States cents per pound for almonds and 39.44 cents for hazelnuts.) The new prices may be compared with 13.25 to 14.00 pesetas per kilogram paid to growers in the Malaga district early this season and the approximate cost to exporters of nuts held at the time of the freeze order. (About 55 to 58.12 U. S. cents per pound).

The new export prices of shelled almonds are more nearly in line with those in Italy and are expected by the Spanish government to result in a substantial revival of the export movement to the United States and other former markets. Latest advices from Italy report a gradual weakening of the almond prices from those earlier in the season. A recent sale of graded shelled almonds in Bari, Italy was made at \$85 C-F New York for bales of 220 pounds and ungraded at \$70 per 220 pounds. The price set for hazelnuts is also more nearly competitive with that of Turkey.

The question as to who will stand the loss between the new fixed prices and the cost of frozen stocks held by importers has not been settled. A Commission composed of representatives of the Ministries of Agriculture and Commerce, Commissariat of Transport and Supply, exporters, wholesalers, growers, and cooperatives is to be formed. The representatives of the exporters and wholesalers are to be selected by the Fruit and Vegetable Syndicate. The representatives of the growers are to be selected by the Provincial Brotherhoods of Livestock Men and Farmers while the cooperative members are to be selected by the National Union of Farm Cooperatives.

SPANISH DRIED FIG PRODUCTION UP

The 1947 preliminary estimate of dried fig production in the eastern Andalusia district of Spain is 5,500 short tons, compared with 3,800 tons in 1946. Production estimates for all of Spain are not available, but the output is very large. The Spanish dried fig production, with the exception of eastern Andalusia, is almost entirely consumed in Spain. A very heavy tonnage is used for human consumption, animal feed, and alcohol.

Exports in prewar years were made from the Balearic Islands and adjacent mainland to France. Figs also were exported from Huelva to the Scandinavian countries, with Malaga, Granada, and Almeria in eastern Andalusia supplying the principal exportable surpluses. Since World War II, exports of Spanish dried figs have been very small. During the 1946-47 season only 110 short tons were exported from Malaga, and this season, to the end of December 1947, only 16 tons had been shipped from Malaga. The bulk (9 tons) of this small tonnage went to Cuba and most of the balance to Brazil. The domestic demand for eastern Andalusian dried figs this season has been very strong. On December 13, 1947 only about 800 short tons remained out of an estimated production of 5,500 tons. The trade believes the 800 tons will be disposed of very rapidly.

(Continued on Page 83)

TOBACCO

SOUTH AFRICA FLUE-CURED PRODUCTION RISES

The 1947-48 crops of flue-cured tobacco in South African countries will be substantially larger than the 1946-47 harvests, according to early-season official forecasts contained in a cable from the American Legation at Pretoria. For Southern Rhodesia, a crop of 75 million pounds is forecast for 1947-48, compared with last season's 55 million. Later estimates may disclose that the forecast for the current crop was in excess of the actual outturn. Prior to the war, Southern Rhodesia's flue-cured production was considerably below that for recent years. During the five seasons, 1934-35 through 1938-39, production averaged 21.6 million pounds. Most of the crop in Southern Rhodesia is exported to the United Kingdom and other Empire areas.

The flue-cured crop in the Union of South Africa for 1947-48 is forecast at 20.8 million pounds compared with a 1946-47 outturn of 13 million. In prewar years, the Union flue-cured crop averaged about 4 million pounds. The Union is a net importer of flue-cured tobacco, however, taking substantial quantities of Southern Rhodesia's surplus for export. For Nyasaland, a 1947-48 crop of 3 million pounds of flue-cured is forecast - about equal to the outturn in recent years. No data are available as yet regarding current production in Northern Rhodesia.

U. S. SHARE IN FRENCH TOBACCO IMPORTS DECLINES

Imports of leaf tobacco into France during the first 11 months of 1947 totalled 63.6 million pounds. Algeria and Brazil, each of which supplied about 14.9 million pounds, were the principal sources of French imports during

the period. The United States supplied 11.1 million pounds - about 17 percent of the total. In prewar (1934-38 years), French imports of leaf averaged 62.8 million pounds annually, of which the United States furnished 20.6 million, or 33 percent of the total.

FRANCE: Imports of leaf tobacco, January-November 1947, with comparisons

Country of Origin	: Average : 1934-38	: 1945	: 1946	: Jan.-Nov. : 1947. a/
	: 1,000	: 1,000	: 1,000	: 1,000
	: pounds	: pounds	: pounds	: pounds
United States.....	20,614	51,724	29,162	11,085
Algeria.....	19,912	1,940	141	14,956
Brazil.....	1,146	584	20,891	14,899
Dominican Republic.....	828	1,563	11,241	9,921
Germany.....	134	157	7,718	33
Madagascar.....	5,877	3,201	3,003	3,095
Turkey.....	b/	1,770	2,515	-
Greece.....	2,088	-	-	419
Bulgaria.....	607	-	558	840
Paraguay.....	b/	580	2,456	3,940
Hungary.....	6,317	-	-	-
Others.....	5,251	732	4,300	4,461
Total.....	62,774	62,251	81,985	63,649

Official sources and Consular reports.

a/ Preliminary. b/ If any, included with others.

Reports indicate that an additional 5.3 million pounds were imported from Bulgaria and Turkey in December 1947. Arrangements have been concluded, or are underway, for the purchase of 4 million pounds from Turkey; 880,000 pounds from Hungary; and 440,000 pounds from Yugoslavia. Preliminary estimates place imports to be made in 1948 from French overseas territories at 12.3 million pounds, comprising 8.8 million from Algeria, 2.4 million from Madagascar, and 1.1 million from other colonies. No data are available regarding planned purchases from the United States this year.

DENMARK STILL
RATIONS TOBACCO

In an effort to stretch supplies of leaf available to manufacturers, and conserve foreign exchange through reduced consumption, Denmark has continued consumer rationing of tobacco products. Each person 18 or more years of age has a tobacco ration, based on a points system. Most consumers are allowed 400 points monthly but in certain cases a consumer who was a heavy smoker in prewar years, may be granted 800 points.

The point values for the various products, prior to a reduction in September 1947, were as follows: one cigarette, 4 points; one cigar, 8 points; one cigarillo, 6 points; one gram of smoking tobacco, 3 points; one package of chewing tobacco, 80 points; and one package of snuff, 40 points.

The point values for cigarettes were reduced in September 40 percent; for cigars and cigarillos, 10 percent and for pipe tobacco, 15 percent. A person with 400 points can now obtain only 60 cigarettes monthly (240 points), but may use the remaining 160 points for other products. Rationing is applied most strictly to cigarettes, cigars, and cigarillos, but not so strictly to smoking tobacco, chewing tobacco and snuff, since supplies of these latter items are larger.

During the period January-October 1947, Denmark imported a total of 16.3 million pounds of leaf tobacco, compared with 28 million for the full year 1946. The United States supplied directly 4.8 million pounds of the total for the first 10 months of last year. Presumably some other shipments originating in this country, were included in re-exports of leaf from the Netherlands and the United Kingdom.

DENMARK: Imports of leaf tobacco, January-October 1947, with comparisons

Country of Origin	Average 1934-38	1945	1946	Jan-Oct. 1947 a/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United States.....	3,721:	835 :	4,835 :	4,837
Netherlands.....	9,024:	- :	2,696 :	384
United Kingdom.....	2,088:	2,118 :	9,976 :	5,919
Brazil.....	35:	- :	7,061 :	4,383
Others.....	4,011:	1,446 :	3,516 :	729
Total.....	18,879:	4,399 :	28,084 :	16,252

Official sources and Consular reports.

a/ Preliminary.

There have been practically no purchases of leaf in foreign countries since November 1, 1947. On the basis of import licenses conditionally granted, factories have made tentative commitments to take about 1,650,000 pounds of United States leaf, within the next few months. Specific information, however, covering planned purchases this year is not available.

INDO-CHINA DEPENDS
ON TOBACCO IMPORTS

Unsettled conditions in Indo-China have sharply reduced commercial tobacco production, and forced manufacturers in French-controlled areas to depend almost wholly on imported leaf. Trade sources state that not more than 100,000 pounds of leaf from the 1947 crop will move to factories. In December 1947, stocks available to manufacturers totalled about 6.6 million pounds - sufficient for about one year's requirements at the current rate of manufacture.

According to unofficial data, imports of leaf during the six months, May-October 1947, totalled 5.9 million pounds - principally from France, Algeria, and the Philippines. Most of the tobacco imported from France, however, was United States leaf transshipped through French ports. Trade sources believe that from 1 to 2 million pounds of leaf originating in the

United States were imported during the six-month period. This is confirmed by data covering declared exports of tobacco from the United States.

For the first half of 1947, the Foreign Currency Allocation Plan provided Indo-China with \$1,900,000 to buy tobacco in the United States, and the equivalent of \$55,000 to purchase leaf in sterling areas. Reports indicate that the dollar allocation for the whole of 1947 was \$2,500,000. The Tobacco Manufacturers' Syndicate intends to ask for \$5,000,000 for leaf purchases in the United States this year, but prospects are that any allocation granted will not exceed the 1947 amount.

GRAINS, GRAIN PRODUCTS AND FEEDS

INCREASED SEEDINGS OF EUROPEAN WINTER GRAIN INDICATED

While still too early for quantitative estimates, reports thus far received indicate that the total acreage sown to winter grains for harvest in Europe during 1948 is likely to show an increase over that of the past two years.

In most areas, the past summer's drought continued into the fall with only scattered rains to relieve dryness. Since mid-November, however, rains have been general over most of Europe and mild weather enabled seeding to be continued much later than usual. On the other hand, fall plantings are not advanced as far as usual because of the backward season, and several critical months remain before harvest.

Mild weather and rainfall in France have been especially beneficial, and crop prospects there are reported to have improved considerably. Official estimates place the total area sown to winter grain in that country on January 1 at 13.2 million acres, compared with the 12.1 million acres sown up to January 1 last year. In addition, weather conditions have been favorable since December 1 and further progress in seeding has been reported. This contrasts with the severe winter of 1946-47 when the wheat acreage lost through winter-kill in France was reported at 3.7 million acres.

Improved prospects as a result of increased moisture supplies are reported also in other parts of western Europe, the United Kingdom and Scandinavian countries. Several of the countries in that group now are reporting increased acreages and favorable growing conditions.

In Sweden, seedings of both wheat and rye are larger than in the fall of 1946, the combined acreage showing an increase of about 25 percent compared with a year ago. Denmark's fall rye seedings are substantially larger than a year ago, and more than offset a reduction in winter wheat acreage. The conditions of winter crops in Denmark also is more favorable than last season when about two-thirds of the winter wheat acreage was reported lost through winter-kill.

In the Mediterranean region, Italy and Turkey are reported to have seeded increased acreages under favorable conditions, and weather conditions during November and December were good. Abundant rains are reported to have relieved drought conditions in parts of the important producing areas of North Africa where somewhat larger acreages are expected.

In central Europe, the fall season was backward with moisture supplies generally inadequate for land preparation and for the seeding and germination of fall sown grains. The consequent delay in farm work is reported to have been especially serious in Austria and parts of Germany, Czechoslovakia and Hungary. The extent to which increased moisture supplies during the past two and one-half months may have improved crop prospects in those areas is not yet known.

Fall moisture conditions have been favorable in the U.S.S.R. and south-eastern Europe, particularly in the lower Danube. Seeding in all of those areas apparently has progressed satisfactorily and increased acreages are reported. Generally favorable conditions are reported for Poland, with seeding of increased acreage accomplished as planned.

AUSTRALIA'S COARSE GRAIN PROSPECTS GOOD

Prospects for the production of coarse grains in Australia are exceptionally favorable, with an exportable surplus of both oats and barley expected. The current situation contrasts with the poor outturn last year, when yields were well below average as a result of severe drought conditions. Because of the shortage of feed supplies in 1946-47, a ban was placed on the export of feeding grains.

No official estimate of the crop of oats and barley is yet available for Australia as a whole. On the basis of latest reports available, however, a record crop of oats is expected in the principal producing States. The prospect was unusually favorable in Victoria, ordinarily the ranking State. Early season forecasts for New South Wales placed the production there as high as 22 million bushels, compared with the previous record of 12 million bushels in 1945-46 and the poor yield of little more than 2 million bushels a year ago. Some loss from excessive rain and wind late in the growing season has reduced the prospects somewhat from earlier expectations, though a record crop is still expected. Good yields of oats are also reported for Western Australia and South Australia.

Record or near-record crops of barley have also been in prospect in the principal areas, especially in South Australia. In that State, the principal barley producer, the forecast outturn was about 14 million bushels in November. This compares with the previous record of about 12 million bushels in 1941-42. In Victoria, the other State important in barley production, the crop was expected to be one of the largest on record.

It is reported that the Australian Barley Board has arranged export sales of part of the barley surplus at the equivalent of \$2.93 per Winchester bushel, at Australian ports. Exports of barley during the first nine months of the 1946-47 marketing year amounted to 2.4 million bushels of which more than half went to India and Belgium. The remainder went to the United Kingdom and New Zealand.

Oats marketing is to be through a voluntary pool, as in the previous year. The Barley Board has been given the sole right to export oats this season, and is charged with the responsibility of receiving the oats into the pool. Growers, however, are free to sell in the open market. The Government has guaran-

teed growers a price of 42 cents per Winchester bushel plus about 3 cents a bushel to offset the increase in bagging costs. According to a recent announcement, the British Ministry of Food has agreed to accept up to 15 million Winchester bushels of Australian oats at \$1.48 a bushel f.o.b. Growers will share in any profits from exports, while this advantage will not, of course, be shared by sellers on the open market. Exports of oats from last year's poor outturn were negligible.

Planting of corn and grain sorghum has just been completed and no estimate of the area planted is available. Conditions for planting have been favorable.

COTTON

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices of certain foreign growths
and qualities in specific markets

Market location, kind, and quality	Date: 1948:	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good.....	1-22	99.05 lbs.	Tallari	58.50	48.81
Ashmouni, F.G.F.....	"	"	"	55.50	46.31
Giza 7, Good.....	"	"	"	63.50	52.98
Giza 7, F.G.F.....	"	"	"	(not quoted)	
Karnak, Good.....	"	"	"	66.50	55.48
Karnak, F.G.F.....	"	"	"	(not quoted)	
Bombay		Candy			
Jarila, Fine.....	"	784 lbs.	Rupee	545.00	20.97
Broach, Fine.....	"	"	"	600.00	23.09
Sine American, Fine.....	"	"	"	680.00	26.17
Punjab " 289-F, Fine....	"	"	"	695.00	26.74
Kampala, East African.....	"	"	"	920.00	35.40
Buenos Aires		Metric ton			
Type B.....	1-23	2204.6 lbs.	Peso	2,620.00	35.38
Lima		Sp. quintal			
Tanguis, Type 5.....	1-22	101.4 lbs.	Sol	170.00	25.79
Pima, Type 1.....	"	"	"	201.00	30.49
Recife		Arroba			
Mata, Type 5.....	1-23	33.07 lbs.	Cruzeiro	130.00	21.39
Sertao, Type 5.....	"	"	"	140.00	23.03
Sao Paulo					
Sao Paulo, Type 5.....	"	"	"	177.50	29.20
Torreón		Sp. quintal			
Middling, 15/16".....	"	101.4 lbs.	Peso	142.00	28.81

Compiled from weekly cables from representatives abroad.

(Continued on Page 83)

FATS AND OILSCZECHOSLOVAKIAN OILSEED
OUTPUT SHOWS DECREASE

Czechoslovakian oilseed production for 1947 was considerably smaller than in 1946 and fell far below the two-year plan to increase the oilseed output by doubling the 1946 acreage. The rapeseed harvest amounted to 10,000 tons compared with 17,000 a year ago. The 6,000-ton mustard seed and the 3,000-ton hempseed harvests each represented decreases of 1,000 tons, while flaxseed output was down 60,000 bushels from 1946.

The failure in 1947 to meet the plan for that year was caused, not so much by the unfulfillment of the sowing plan, as by the decrease of the area harvested, owing to the fact that the oilseeds sown in the fall of 1946 were mostly destroyed by the winter-kill and those sown in the spring of 1947 were badly damaged by drought. The growing of oilseeds in Czechoslovakia has met with great difficulties. A successful harvest is always doubtful and often crops are ravaged by pests and the elements. For instance, since the war the areas sown to rapeseed have been destroyed by winter freezes three successive seasons. In addition, oilseed production requires much labor, and agricultural labor particularly is now in short supply.

Due to the great need for fats and oils, acreage planted to oilseed crops with the exception of hempseed, was greatly expanded during and after the war. By 1945 however, yields per acre had dropped noticeably due to insufficient supplies of fertilizer, inadequate tillage, and other war effects. Yields have continued low during the past two years.

Oilseed acreage for 1948 has been planned on the demand of the Ministry of Food, which calls for a higher domestic output, as imports from abroad are not sufficient or assured.

In order to supply the margarine industry sufficiently and to secure the present margarine rations, it will be necessary to supplement 1947's short domestic stocks by larger importations from other countries.

CZECHOSLOVAKIA: Oilseed acreage and production,
1947 with comparisons

Oilseed	Average 1934-38 a/	1945	1946	1947
	1,000 acres	1,000 acres	1,000 acres	1,000 acres
Acreage				
Rapeseed.....	12	82	81	38
Mustard seed.....	1	31	37	45
Poppy seed.....	34	72	73	64
Flaxseed.....	32	47	50	50
Hempseed.....	b/ 18	14	15	14
Production	Short tons	Short tons	Short tons	Short tons
Rapeseed.....	7,886	27,341	17,066	9,859
Mustard seed.....	425	839	7,150	5,758
Poppy seed.....	12,336	17,083	13,283	10,252
Flaxseed c/.....	228	d/	277	214
Hempseed.....	4,170	3,049	3,807	2,728

American Embassy, Praha.

a/ Includes Ruthenia. b/ Average of less than 5 years. c/ 1,000 bushels

d/ Not reported.

BURMA PEANUT ACREAGE INCREASED SLIGHTLY

Peanut acreage in Burma for the 1947-48 season amounts to 661,000 acres according to the third estimate. This is a 15 percent increase over last year's acreage but 4 percent less than the average for the ten prewar years. Scarcity of rains at the time of the formation of pods has resulted in a low condition figure of 73. The estimated outturn is now 165,000 short tons of peanuts in the shell.

LIVESTOCK AND ANIMAL PRODUCTS

FRENCH DAIRY SITUATION

By the fall of 1946, French cattle numbers had increased almost to pre-war levels, but milk cows were about 15 percent less numerous. The increase in total numbers was checked by reduced feed supplies in 1947, but both milk cow numbers and total cow numbers in the fall of 1947 were slightly higher than a year earlier.

There are more than twenty breeds of cows in France, but many of them are not suitable for efficient milk production. The Normandy, Flanders and Holland (Black and White) breeds are, however, excellent milk producers. The production of sheep and goat milk is on a small scale and is important mainly because of its use in the manufacture of specialty cheeses, such as Roquefort.

Good feed supplies during 1946 and the first half of 1947 permitted an increase in livestock numbers and in average milk yield per cow. But the intense summer drought dried up pastures and reduced feed supplies in 1947, causing widespread liquidation of cattle and seriously reducing milk production. Inadequate supplies of oilcakes, which were less than half the prewar availabilities, were also an important factor in the reduction of the post-war milk production.

Some French milk-processing plants suffered war damage and others needed extensive re-equipment. In general, however, the industry was in good condition at the end of the war, and production was limited not so much by lack of capacity as by lack of milk supplies. Bottling works and increased capacity for the production of unsweetened evaporated and powdered milk are, however, greatly needed, as are refrigerated equipment and transport. Improved sanitary regulations are also very desirable.

The original milk production program for 1947 was set at 22,719 million pounds, including 7,043 million pounds for animal feeding, 3,862 million pounds for human consumption on the farm, 3,408 million pounds for use as commercialized fluid milk, and most of the balance for the production of 230 million pounds of cheese and 229 million pounds of butter. In addition, French plants were expected to produce 39 million pounds (912,000 cases) of sweetened condensed milk, 12 million pounds (250,000 cases) of unsweetened evaporated milk, 9 million pounds of casein, and 3 million pounds of powdered milk suitable for infant feeding.

During the first seven months of 1947 the production of milk and dairy products exceeded that of the corresponding period of 1946, and expectations

were that the planned annual production of most dairy products would be exceeded during the year. Beginning late in July, however, and continuing through the last five months of the year, the production of milk and dairy products declined rapidly.

By the end of the third quarter, milk production had totalled about 17,115 million pounds, with a commercialized production of 9,041 million pounds which included 3,070 million pounds consumed as fluid milk. The commercialized production of dairy products to October 1 reached the following totals: 154 million pounds of butter; 203 million pounds of cheese; 6 million pounds of casein; 2 million pounds of powdered milk; 29 million pounds (687,458 cases) of sweetened condensed milk, and 10 million pounds (211,799 cases) of unsweetened evaporated milk.

On the basis of preliminary official evaluations, total milk production in 1947 is now expected to total some 20,447 million pounds, with 11,121 million pounds representing commercialized milk. The commercialized production figure corresponds to the following milk utilization: Fluid milk, 3,766 million pounds; butter, 198 million pounds; cheese, 243 million pounds; sweetened condensed milk, 34 million pounds (over 800,000 cases); unsweetened evaporated milk, 13 million pounds (270,000 cases); powdered milk, 3 million pounds; and casein, 6 million pounds.

During the first nine months of 1947, France was a net importer of fluid milk, butter, unsweetened evaporated milk, powdered milk, and casein. She was a net exporter of cheese, including important quantities of Roquefort, and also sent sweetened condensed milk to her colonies.

A rationing system for milk and dairy products, imposed during the war, was continued during 1946 and 1947. Effective July 1, 1947, slight alterations in the system of ration groups were made, but under both systems fluid milk was reserved for children, pregnant and nursing women, medical diets, and people over 70. During the latter half of 1947 daily fluid milk arrivals in Paris fell so low that only part of the rations were met, and small supplements of powdered and condensed milk were issued. The situation is not expected to improve until the spring of 1948.

After the war the government continued price controls. These were evaded in many cases by illegal farmer retentions, animal feeding, and diversion into the black market of extensive quantities of butter, cheese, and fluid milk. Producers considered price increases granted in March and August inadequate for profitable production. Even price increases of about 50 percent authorized in September did not improve farmer deliveries or check the black market, but the effects of the drought in lowering milk production had also become a factor limiting deliveries.

Long-range plans for the French dairy industry are being developed as part of the Monnet Plan and include, as goals for 1950, the production of 34,078 million pounds of milk, the addition of 40,000 milking machines, the creation of new bottling works, the installation of refrigerated storage and transport facilities, and the construction and equipment of numerous dairy plants. The program is being carried out only in part.

Data from U.S. Foreign Service report. A more extensive statement on this subject can be obtained from the Office of Foreign Agricultural Relations.

COTTON

(Continued from Page 79)

**COTTON MILL OPERATIONS
IN SPAIN IMPROVES**

A slight improvement was noted in Spain in cotton mill operations in November as 65 percent of the spinning mills operated on a 6-day shift basis compared with 45 percent in October. The remaining 35 percent of the mills were closed. About 40 percent of the weaving mills were closed during November, 30 percent operated 4 days a week on a 2-shift basis, and 30 percent on a 4-day, 1-shift basis.

Imports in December totalled 20,000 bales (of 500 pounds gross) making a January-December total of 337,000 bales compared with 285,000 in 1946. The 1947 total included 178,000 bales from Brazil, 95,000 from India, 32,000 from Egypt, and 26,000 from the United States. No new purchase contracts were made in November.

Stocks on hand (excluding small mill stocks) at the end of November were equivalent to about 39,000 bales, mostly Brazilian, Indian and Egyptian, and were sufficient for only one month's requirement at the November rate of mill consumption.

FRUITS, VEGETABLES AND NUTS

(Continued from Page 74)

**BRITISH CONTRACT FOR 3.3 MILLION
BOXES SPANISH ORANGES**

The United Kingdom has contracted with the Spanish Fruit and Vegetable Syndicate for the purchase of 100,000 metric tons (3,340,000 boxes of 66 pounds) of Spanish oranges at a price of 34.5 pesetas (\$3.15) per box f.o.b. Valencia. The price being paid under the 1948 contract is about 25 percent lower than the British paid under their contract for approximately 81,000 metric tons of Spanish oranges in the 1946-47 season.

Immediately following the signing of the British contract the price being asked in the Valencia area reportedly increased from 47 to 48 pesetas (\$4.29 to \$4.38) per box of 30 kilos (66 pounds). It is estimated that Spain has an additional exportable surplus of 150,000 to 200,000 metric tons (5,010,000 to 6,681,000 boxes) of oranges for which contracts have not been obtained.

E C O N O M I C D E V E L O P M E N T S

RUMANIA'S FOUR-YEAR PLAN FOR AGRICULTURE

Rumania, only recently has begun to follow the lead of the other Balkan countries in developing an economic plan. Parched with drought in 1945, 1946, and the spring of 1947, its recovery from the war and economic reorganization along the Soviet pattern have barely begun.

A radical land reform program was introduced in 1945, and a system providing for compulsory sale to the State of varying proportions of the farmer's crops, price control, and rationing of the urban population has been in effect since early in 1946. It wasn't until June 14, 1947, however, that the first "plan" was announced. It was a six-months plan submitted to the Cabinet on behalf of the Communist Party of Mr. Gheorghe Gheorghiu-Dej, Minister of Industry and Commerce, and unanimously adopted. Details were not published.

In mid-August of last year, a drastic devaluation of the currency was carried out, and at the same time, prices were raised and wages, especially of lower paid workers, were greatly increased. Inflation has continued, although industrial production is reportedly increasing, and agricultural production has improved over last year, especially with a large corn crop.

Traian Savulescu, Minister of Agriculture, in a speech before the Chamber of Deputies, November 24, 1947, described the Government's Four-Year Plan for Agriculture, which, however, is to be completed by the end of 1950. The plan has not been published, nor was the Minister's speech reported verbatim in the press, so that information concerning the plan is limited to rather generalized descriptions of the economic and political goals.

The Four-Year Plan for Agriculture is an effort by the State to organize and direct the productive efforts of the three-quarters of the Rumanian population engaged in agriculture. Politically it does not envisage radical Sovietization of agriculture, but rather the detailed regulation of individual peasant agriculture with the introduction of acreage plans, compulsory collection quotas at fixed prices, model state farms, and stations where peasants can hire tractors, machinery, and animal draft power.

Economically, the plan calls for restoration or increases in crop production, acreage shifts, emphasizing wheat, potatoes, sugar beets, and oil seeds (probably at the expense of corn acreage, but this was not stated), and replenishing livestock numbers, especially hogs, sheep, and poultry. The acreage of winter wheat, almost sown at the time of the speech, is to be 2,610,000 hectares (6,449,000 acres), or more than a million hectares (2,471,000 acres) above last year, and 30,000 metric tons of seed will be imported from the Soviet Union to help extend the area under spring wheat.

The methods to be used in increasing production stress the greater use of machinery, including the co-operative use of tractors, now being manufactured in Rumania, improvement in farm practices with widespread distribution and use of select seed and purebred livestock, and the extension of credit granted to farmers by the State. The land reform of 1945 must be completed. Already, the Minister of Agriculture reported, there are 2,350,000 out of 2,855,000 farms not larger than 10 hectares (24.7 acres). An agricultural census is to be taken in 1948 to determine the needs of the plan.

"The Government's policy," Mr. Savulescu stated, "will be more and more a policy of liberation for the peasantry, not so much control or coercion but guidance, advice and collaboration." On the international level, the plan foresees a revival of trade oriented towards and helped by the Soviet Union.

L A T E N E W S (Continued from Page 61)

The Customs Division of the Canadian Department of National Revenue on January 2, 1948 removed dried plums or prunes, raisins, and dried currants from import control under the Export-Import Permit Act.

Pitted plums and prunes (Item 99b) are still prohibited importation under Appendix VII to the Emergency Exchange Conservation Order in Council effective November 18, 1947.

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Belgium will de-ration meat effective February 1, according to information recently received from that country.

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Prices during the opening week of the 1948 United Kingdom wool sales, held at London (January 12 - 19) showed further increases as compared with the last sale of the year 1947 which closed December 5.

Cables from the American Embassy at London gave the average opening price for the first week for good medium fleeces of 64's - 70's fineness at \$1.48 clean scoured basis, compared with the December closing price of \$1.38, an increase of 7 percent. The price for the opening week of 1947 for this type was 83 cents.

Fine crossbreds 56's averaged 94 cents against the December closing of 89 cents and the 1947 opening of 65 cents. Crossbred wool of 46's quality was 55 cents against the December closing of 52 cents and last year's opening of 44 cents.

Soviet Union buyers were very active at the opening sales, making large-scale purchases of greasy merino combing wool, as well as of fine crossbred and comebacks. Bradford and French buyers competed keenly for

wanted sorts with American buyers bidding for the better sorts of merinos but frequently being outbid as the prices offered were below current market levels. Very little American style wools were offered.

The United Kingdom - Dominion Wool Wool Disposals Limited - (J.O.) planned to offer from its stocks about 20 million pounds at the First Series (Jan. 12-19), including 6 million pounds of greasy merino combing wool. The quantity offered privately is not available as yet.

The next series will take place at Liverpool beginning February 2 when the Joint Organization plans to offer 12 million pounds.

During the final series of 1947 sales (November 12 - December 5) total offerings comprised 45 million pounds, 34 million pounds of which were from Joint Organization stocks. United Kingdom buyers purchased 26 million pounds and Continental buyers, principally French, bought 18 million pounds.

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The Argentine cotton crop is later than usual this year because of extensive replanting made necessary by heavy locust damage to the young plants. Contrary to earlier expectations, the acreage increase is not expected to exceed 10 percent of the 979,000 acres planted in 1946-47. Heavy rains in September and early October followed by very dry conditions until late in November were detrimental to planting operations.

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Cotton stocks in Czechoslovakia, according to an official report, increased from 42,000 bales (of 500 pounds gross) on August 1, 1946 to 105,000 a year later. Imports in 1946-47 totalled 266,000 bales, including 144,000 from the United States, 72,000 from Egypt, 10,000 from the Soviet Union, and 40,000 from unspecified sources. Mill consumption amounted to 203,000 bales during this period.

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The third official estimate places Burma's 1947-48 cotton crop at 35,000 bales (of 500 pounds gross) from 197,100 planted acres. Export surplus from this crop is estimated at 28,000 bales. The condition of the crop is below normal except in the Thayetmyo district where the medium staple cotton is grown.

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